

Gay and Lesbian Key West Visitor Survey

Spring 2005



The Key West Business Guild

THE FLORIDA KEYS & KEY WEST
MONROE COUNTY TOURIST DEVELOPMENT COUNCIL
Come as you are®

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Introduction

In the spring of 2005, the Key West Business Guild began to plan a survey of gay and lesbian visitors, and potential visitors, to Key West. The Guild identified four primary objectives of the survey:

- 1) To measure levels of visitor satisfaction with the process of seeking and obtaining information on Key West.
- 2) To understand the motivation of visitors to come to Key West and the factors contributing to visitors' decision not to come to the Key West.
- 3) To evaluate the experience of gay and lesbian visitors to Key West.
- 4) To validate our understanding of gay and lesbian demographics.

The target respondents were vacationers with a propensity toward visiting Key West. That is, potential and actual Key West visitors who had sought information on Key West gay and lesbian travel. The Guild utilized the visitor database they have developed from calls to a gay and lesbian traveler information line they service. In order to further reach gay and lesbian travelers, and to provide general visitor response statistics for comparison, the Guild also sent the survey to those who had opted in to receive e-newsletters from the TDC's web site, www.fl-keys.com.

Jon Allen developed the survey with the concurrence of the Guild Board. It was sent to 3,000 potential and actual visitors via email. Respondents were then directed to a web site, hosted by Survey Monkey to complete the 27 question survey. The Guild received 727 responses. This is comparable to response levels on the TDC's quarterly visitor profile survey.

The results were very positive. An overwhelming majority of respondents, both recent visitors (within one year) and non-visitors/visited more than a year ago gave Key West a positive rating as a destination (96% recent visitor, 95% non-visitor/visited more than a year ago). Rating of the destination was comparable among respondents who were recent first time visitors, recent repeat visitors, past visitors and non visitors. All overwhelmingly gave Key West a positive rating as a destination. The response most chosen in each group was the highest possible rating of "Great". Visitors were most satisfied with the atmosphere of this island, which they described as accepting, laid back and friendly. Non-visitors/visitors of more than a year ago shared the perception of recent visitors as Key West's most positive attribute being its atmosphere. In the following section, we will review the results of the survey.

Survey Findings

The survey was divided into two parts, those respondents who had visited Key West in the past year and those who had either never visited, or visited more than a year ago. The first group was asked 24 questions regarding their satisfaction with the destination, their trip experience, their vacationing habits and general demographic information. The second group was asked two questions to gauge their perception of Key West as a vacation destination.

I. Visitation Rate

47.5% of the respondents, or 344, had visited Key West in the past year. Please note, respondents were not asked if they had **ever** visited Key West before. Rather, the survey sought to determine if they were recent visitors, within the past year. This was in part to assure their impressions of the destination were current and would provide insight into today's visitor. Response of this question was used to divide the survey respondents. Only those who had visited in the past year were asked questions 3 – 24.

II. Recent Visitor Responses

1) Other destinations Traveled

Respondents were given a series of other destinations, both national and international, and asked to select those which they had also traveled to within the past year. Respondents were allowed to choose more than one vacation destination. Respondents were also allowed to fill in other vacation destinations through the response "other".

39% of respondents did report visiting at least one other destination than Key West in the past year. The destination chosen by the most respondents was, Ft. Lauderdale (48.5%). This possibly indicates a combination trip with a visitor spending part of their vacation in Ft. Lauderdale and part in the Keys. The Guild, in their regular survey of callers to their 1-800 visitor information line, does ask if the caller intends to combine their trip to Key West with Ft. Lauderdale. About 20% of callers year to date have indicated that they did intend to visit Ft. Lauderdale and Key West on the same trip.

The destinations written in under "other" were both international, including Amsterdam, Paris and Berlin, and domestic, including West Palm, Orlando and Portland. The results are as follows:

Visitation to Other Destinations

Area	Count	Percent of responses	Percent of Cases
New York	35	9.0	26.9
San Francisco	22	5.6	16.9
London	11	2.8	8.5
Other big city destination	54	13.8	41.5
Provincetown	15	3.8	11.5
Palm Springs	12	3.1	9.2
Rehoboth Beach	10	2.6	7.7
Other resort destination	22	5.6	16.9
Ft. Lauderdale	63	16.1	48.5
South Beach	35	9.0	26.9
Other Florida destination	56	14.3	43.1
Other adventure destination	14	3.6	10.8
Other	33	8.4	25.4

2) Satisfaction with the destination

Respondents were asked to rate on a scale of 1 to 10, with 1 being poor and 10 being great, how they would rate their experience in Key West. The overwhelming majority (96%) reported a positive experience with the most respondents selecting 10, a great experience (35%). 2% were neutral, while less than 2% reported a somewhat negative experience to poor experience. The results were as follows:

Rating	Poor			Neutral					Great		
	1	2	3	4	5	6	7	8	9	10	Avg
	<1%	<1%	0%	1%	2%	3%	6%	22%	31%	35%	8.75

3) Attributes contributing to positive experience

Respondents were asked to recall what they most liked about Key West. They were given a free form in which to enter their response, and therefore were able to name more than one attribute. The respondents felt the only thing that topped our beautiful tropical weather was our atmosphere; described as open, gay friendly, laid back and accepting. Some respondents actually reiterated the TDC slogan, "Come As You Are", when describing the accepting, laid back atmosphere. This is demonstrative that our product's message appropriately represents our product, as indicated by our visitors' recall of their experience. Further, the verbatim recall of the slogan demonstrates that it is reaching one of our target audiences, the gay and lesbian traveler.

The friendly people, especially the locals, was the third most cited attribute respondents liked about Key West. Other responses included the ocean, nightlife, food, shopping,

walkability, history, culture, gay businesses and the accommodations. A complete list of the responses is available in the TDC office.

4) Improving the Destination

Respondents were next asked what could be done to make Key West a more appealing destination. The majority of respondents cited reducing the cost of vacationing in Key West, in particular accommodations, as a means to improve the destination. The second highest area for improvement was transportation and access; including traffic, parking, better flight routes and schedules. Visitors felt Key West could improve its methods for both getting to the destination, and ease at which visitors travel within the island. The third most cited area for improvement was beach and water quality. Next, respondents cited control of development, including reducing chain businesses, generic and condos. Other areas for improvement included increasing gay businesses and events, preventing closures of gay accommodations, reducing cruise ship visitor volumes, t-shirt shops, street cleaning and pan handling. A complete list of the responses is available in the TDC office.

5) Activities

Respondents were given a list of activities and asked to choose those which they engaged in during their visit. The most popular activity was dining out, with an overwhelming number of respondents 98.1%. The second most popular activity was shopping (89.7%) followed by going to bars (86.2%) The results were as follows:

Activity	Response Percent	Response Total
Dining out in restaurants	98.1	314
Shopping	89.7	287
Bars	86.2	276
Drag Show	61.9	198
Art Galleries	56.2	180
Dancing	55	176
Live Music	52.8	169
Museums	50.6	162
Walking Tour	38.4	123
Bicycling	37.2	119
Snorkeling	34.4	110
Semi-Nude Dancers	29.4	94
Other	29.4	94
Gay Trolley Tour	26.6	85
Nude Dancers	20.6	66
Mainstream trolley or train tour	19.1	61
Working Out	18.1	58
Trip to the Dry Tortugas	13.1	42

Live Theater	13.1	42
Fishing	9.4	30
Kayaking	8.1	26
Diving	7.2	23
Movies	7.2	23
Lap Dance	6.2	20

6) Accommodations

Respondents were asked to choose the type of accommodations they stayed at while in Key West. The most popular accommodation type among respondents was all-male guesthouse (38.2%). All-welcome hotel or guesthouse was the second most popular accommodation (27%), followed by gay & lesbian guesthouse. The results are as follows:

Type	Response Percent
All welcome	27
All male	38.2
All women	5.3
Gay & Lesbian	16.6
With friends	2.2
Vacation Rental	6.9
Cruiseship	3.8
Day tripper	3.1
Other	10.7

7) Transportation

Visitors were asked how they arrived in Key West. The majority of respondents drove to their vacation (52.3%), with 21.9% driving from their home and 30.4% driving a rental car from another Florida airport. 40.4% of respondents flew in to Key West. This significantly differs from visitor profile studies done on general visitor populations. In those surveys, the number of respondents reporting flying into a Keys airport is generally 10 to 15%, while 80 to 85% report driving to the Keys.

8) Travel Party

The majority of respondents traveled to Key West with a significant other, including spouse, partners, boyfriends and girlfriends (40.4%). Traveling with gay friend(s), was the second highest selected travel companion (25.1%); followed by traveling alone (16%), traveling with straight friend(s) (7.2%), traveling with family (6.9%) and finally other types of companions (2.5%).

9) Trip Purpose

The overwhelming majority of respondents traveled to the Keys for pleasure (91.8%) with only 1.6% traveling for business. Other trip purposes were cruise stop (2.2%), family event (1.9%), respondents' wedding or commitment ceremony (1.6%).

10) Repeat visitation

Respondents were asked how many times prior they had visited Key West. The majority (67.9%) were repeat visitors who had been to the destination prior to this past years' trip. 42.1% had been to Key West 2 to 5 times, while 25.8% had been to Key West more than 6 times. 32.1% of respondents' trip to Key West in the past year was their first visit.

11) Length of Stay

The average length of stay for respondents was 5.24 days. This is about one day less than average length of stays reported by respondents in the TDC annual visitor profile surveys.

12) Age

The majority of respondents were between 36 and 45 years old. This is right in line with annual visitor profile studies as average age is generally 39.

13) Foreign versus Domestic Visitors

The overwhelming majority of visitors (93.4%) were domestic. Respondents of foreign origin were primarily from Canada (2.2%) or the UK (2.2%). While the incidence of foreign respondents is much lower than the TDC annual visitor profile surveys, the rank of top countries was the same. Most domestic respondents reported originating from the Northeast (27.4%), followed by the Mid-West (23.6%), Florida (21.7%), other Southern State (18.6%) and the West (8.8%).

14) Sexual Orientation

The majority of respondents considered themselves gay (66.9%), followed by lesbian (18.9%), bisexual (7.3%), straight (4.4%) and other (2.5%).

15) Income

Income ranges followed a bell curve from among respondents ranging from \$26,000 to over \$121,000. In the middle of the curve, cited most often, was an income ranging from \$61,000 to \$81,000. Respondents were fairly evenly split between the ranges considered affluent (above \$75,000) and below. As we do not give a respondents a range of incomes to select during the visitor profile surveys, we can not compare the distribution of income. However, we can say that a much higher percentage on this survey (60%)

indicated an income that is considered affluent (above \$75,000) than on the annual visitor profile studies (46%).

16) Media

Respondents were asked if they were members of a series of gay and lesbian websites and whether they read a series of gay and lesbian publications. As some of these sites and publications cater more to a particular sex, and there was a much smaller representation on our survey from lesbians (19%) than gay men (67%), we separated their responses. We also tabulated responses for the entire group. This did result in some differences among site membership and publication readership. As one would expect, the media geared toward lesbians had a much higher rate of readership/membership among the respondents who identified themselves as lesbians than the total group. As respondents identifying themselves as gay were the majority of total group, there is little change among this group when separated from total responses, beyond a decrease in membership/readership to media geared toward lesbians.

Among gay respondents, the most popular web site was gay.com. Among lesbian respondents, the most popular web site was planetout.com. Among gay respondents, the most popular publication was a local gay paper. Among lesbian respondents, the most popular publication was The Advocate. The results are as follows:

Web Site Membership			
	Gay Respondents	Lesbian Respondents	All Respondents
gay.com	76%	16.1%	63.7%
planetout.com	32.2%	51.6%	34.7%
Other	10.3%	25.8%	14.7%
manhunt.net	16.4%	0%	13.2%
gaydar.co.uk	15.1%	0%	12.1%
curve.com	0.7%	25.8%	5.3%
lesbiannation.com	0%	25.8%	4.2%
Media Subscription			
Local gay paper	70%	44.9%	63.6%
The Advocate	46.1%	53.1%	46.4%
Local gay magazine	44.4%	16.3%	38.4%
Out	42.2%	18.4%	34.8%
Out Traveler	35%	18.4%	30.4%
Instinct	27.8%	0%	20.4%
Genre	17.2%	2%	13.2%
Curve	0.6%	49%	10.8%
Girlfriends	0%	26.5%	5.6%
Passport	3.9%	0%	3.2%
Metro Source	2.2%	4.1%	2.4%
GONYC	1.1%	0%	0.8%
Diva	0%	0%	0.4%

17) Trip Planning

The majority of respondents used the internet (86.7%) to find information on destinations and plan their vacations. Word of mouth garnered a strong following with 42.9% turning to friends during the information gathering stage of their vacation planning. Publications including Gay and Lesbian Magazines (49%), Travel Magazines (41.2%) and Guide Books (39.3%) were also influential. Respondents were allowed to choose more than one information source. The results show they are generally consulting more than one source for information when selecting their vacation destination.

18) Cruise Ship Experience

Respondents were asked what their level of experience with cruise ship travel was, from past experience to future plans. Most had been on a cruise (47.6%). This is much higher than the percentage of U.S. adults who have cruise experience (16%) as reported by CLIA (Cruise Line International Association). The age of our respondents and affluence level was comparable to the average cruise vacationer as surveyed by CLIA, age 44 with an income of \$78,000. Of those who had cruised, most had been on an all-welcome trip (38.9%) while 8.7% reported being on a gay or lesbian cruise. 9.3% had no cruise experience and did not intend to cruise.

There was also a high rate among our respondents of those who were considering going on a cruise (45.7%). As more than one selection could be chosen, respondents who were considering a cruise vacation could be past cruisers or could be considering cruising for the first time. When we compared the responses to past cruise experience, we found only 4 respondents out of 142 had past cruise experience. When combining those who had cruise experience with those who were thinking of cruising, the overwhelming majority of our respondents (91%) were open to cruise ship travel. Among that group, 5.1% of respondents currently had a reservation for a future cruise vacation booked.

19) Adult Entertainment

The majority of respondents seek sexually oriented activities or entertainment when they are traveling (62.1%).

III. Non Visitor and Visitors From More Than a Year Ago Responses

1) Other destinations Traveled

Respondents who indicated they had not visited Key West within the past year were given a series of other destinations, both national and international, and asked to select those which they had traveled to within the past year. Respondents were allowed to choose more than one vacation destination. Respondents were also allowed to fill in other vacation destinations through the response “other”.

87% of respondents did report visiting at least one of the destinations listed, or selected “other”. Of those respondents who had indicated they had vacationed in the past year, either by selected a destination listed or other, 69% had visited more than one location. This was a much higher rate of taking more than one vacation in the past year than those visitors that had spent at least one trip in Key West in the past year (38%). The destination chosen by the most respondents was, “another big city destination” (35.2%).

As you may recall, for respondents who had visited Key West in the past year, the most popular destination they selected in which they had also traveled was Ft. Lauderdale. There were much lower percentages of respondents reporting traveling to another Florida destination among the group who had not been to Key West within the past year, than those who had. To compare, 50.5% of the recent visitor group reported traveling to Ft. Lauderdale this past year versus 23.3% of those who had not visited Key West at all or within the past year. Likewise, 30.8% of the recent visitor group reported traveling to South Beach in the past year versus 10.4% of those who had not visited Key West at all or within the past year. Finally, 45.9% of the recent visitor group reported traveling to another Florida destination versus 32.2% of those who had not visited Key West at all or within the past year.

The destinations written in under “other” were both international, including Amsterdam, Paris and Berlin, and domestic, including West Palm, Orlando and Portland. The results are as follows:

Respondents Who Had Not Visited Key West in the Past Year
Visitation to Other Destinations

Area	Count	Percent of responses	Percent of Cases
New York	89	10.8	26.6
San Francisco	32	3.9	9.6
London	32	3.9	9.6
Other big city destination	129	15.6	38.5
Palm Springs	39	4.7	11.6
Provincetown	26	3.1	7.8
Rehoboth Beach	21	2.5	6.3
Other resort destination	67	8.1	20.0
Ft. Lauderdale	78	9.4	23.3
South Beach	35	4.2	10.4
Other Florida destination	108	13.1	32.2
Other adventure destination	23	2.8	6.9
Gay or lesbian cruise	15	1.8	4.5
All welcome cruise	22	2.7	6.6
Other	110	13.3	32.8

2) Rating of Key West

Those visitors who had not visited Key West within the past year, were also asked to rate Key West as a destination. Keep in mind that these respondents may have visited Key West more than a year ago or may not have ever visited the destination. The satisfaction level was the same as those respondents who had been to the destination within the last year, an average ranking of 8.75, with the most popular response being “great” (38%). 1% were neutral, while less than 4% reported a somewhat negative to poor perception. Rating of the destination was comparable among respondents who were recent first time visitors, recent repeat visitors, past visitor and non visitors. All overwhelming gave Key West a positive rating as a destination. In particular, this group’s responses indicate perception of the destination is not likely a barrier for visitation or repeat visitation as the overwhelming majority of respondents (95%) had a positive perception of the destination. The results were as follows:

	Poor				Neutral				Great		
	1	2	3	4	5	6	7	8	9	10	Avg
Rating	<1%	1%	1%	<1%	1%	2%	8%	22%	26%	38%	8.75

3. Word of Mouth: Impression of Key West

Those visitors who had never visited Key West, or had not visited Key West within the past year, were also asked what they had heard of Key West as a destination. Few had not heard of Key West, and even fewer gave negative impressions of the destination. Both the positive and negative impressions mimicked what respondents who had visited within

the past year reported about Key West. Positive impressions included welcoming, gay friendly atmosphere, great weather, a fun environment and good food. Negative impressions included cost, crowding from cruiseship passengers and proliferation of t-shirt shops. A complete list of the responses is available in the TDC office.

III. Validating the Results

Once the Guild had reviewed the responses from the original survey, they questioned whether the overwhelming positive response of the perception of Key West was skewed as the respondents had already demonstrated a propensity toward visitation. That is, the survey group that had been selected had previously sought information on visiting the destination either through the Guild or the TDC, and therefore had demonstrated a propensity toward visiting Key West. The Guild sought to understand vacationers' perceptions of the destination that had not demonstrated a propensity toward visiting. They sought to further validate the data and assumptions by selecting survey groups from other web sites. First they utilized the popular blog web site, www.andrewsullivan.com, by providing a link on the site to their survey. They received 133 surveys responses. Approximately half of the respondents were gay. Next, in an effort to increase female response rates, the Guild utilized an opt in email database of the lesbian site, www.lesbiannation.com. The Guild received 751 responses.

As one might expect, there were much lower rates of recent visitation among the Andrew Sullivan group and the Lesbian Nation group than the group that had shown a propensity toward a Key West vacation, the Guild/TDC group. The Andrew Sullivan group had a recent visitation rate of 17.3% of respondents. The Lesbian Nation group had a recent visitation rate of 12.5%.

What was unexpected, and served to further validate the results of the original group, was that the overwhelming majority of respondents from the Andrew Sullivan group and the Lesbian Nation group had a positive perception of the destination. This was true whether the respondent had recently visited the destination, had not visited or not recently visited.

Both groups' recent visitors reported comparable experiences in Key West as the Guild/TDC group. The overwhelming majority (90%) of the Andrew Sullivan groups' recent visitors reported a positive experience in Key West. As with the Guild/TDC group, the majority (36%) of the Andrew Sullivan groups' recent visitors choose the highest rating of "10" or "great". Likewise, the overwhelming majority (88%) of the Lesbian Nation groups' recent visitors reported a positive experience in Key West. As with the Guild/TDC group, the majority (35%) of the Lesbian Nation groups' recent visitors choose the highest rating of "10" or "great".

The attribute of Key West that was cited most positive among recent visitors for both groups was also the atmosphere, again described as laid-back, gay-friendly and accepting. Among the respondents for the Andrew Sullivan and Lesbian Nation group who had not visited Key West, or had not recently visited Key West, there was also a very positive perception of the destination. For the Andrew Sullivan Group, 89% had a positive perception of the destination, with the majority (32%) selecting "10" or "great". For the Lesbian Nation, group 91% had a positive perception of the destination, with the majority (30%) selecting "10" or "great". These results would suggested that the respondents, either through advertising, personal experience or word of mouth, perception of Key

West is in alignment with our message as a place where visitors can “come as they are” and have a positive vacation experience.